



# Understanding Your Customer

A simple guide to help federal agencies and employees understand their customers and deliver better customer experiences to Americans.

# Acknowledgements

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# Foreword

The last few years have been marked by defining American citizens as “customers”; training employees in customer service techniques, gathering feedback on satisfaction from customers, and establishing customer service offices. While the importance of the customer is not a new concept for federal agencies, there is a shift to a more comprehensive approach of engaging with the American public and providing an “end-to-end customer experience” with government. This emphasizes the customer’s perspective of their entire experience with the government, across all touchpoints (web, contact center, in person interactions). “Customer service” delivered within these channels reflects the one-to-one interaction and is *one part* of the customer’s journey or experience. This is an important distinction as we aim to improve citizens’ satisfaction with government. We must move from good customer service delivery to improving the entire experience every step along the customers journey within agencies and across government programs and services.

Understanding our federal customers is at a critical juncture. Results show that overall citizen satisfaction dropped 2.6 percent to 64.4 as compared to 2013, and much more significantly than earlier 2012 score of 80. Specific areas within the realm of customer satisfaction, such as courtesy and helpfulness of agency staff, dropped even more significantly by 6 percent. Despite efforts over the last decade to improve customer service, there is overwhelming evidence that federal agencies are not meeting the expectations of customers.

*The state of customer service across the Federal Government scores is at an all-time low. Americans continue to be less satisfied with the services provided by the U.S. Federal Government.*

Source: 2014 American Customer Satisfaction Index (ACSI)

Customer service is one of 15 cross-agency priority goals in the President’s Management Agenda for 2015. Agencies are charged with *transitioning their work environment and culture to deliver world-class customer service*. **Understanding your customers** and their needs is the single most important step when building, buying and delivering better products and services.

*“Government must build, buy, and deliver services that meet the expectations of a 21st century society, taking into account the rapid pace of innovation and user experience to which American citizens and businesses are accustomed.”*

Source: President's Management Agenda, 2015

This simple guide provides five points to help you get started in your journey to better understand your customers. This is the foundation for all other customer experience efforts that your organization or agency will take as we strive to meet the needs of American citizens and improve our delivery of programs and services to those we serve.

*“Get closer than ever to your customers. So close, in fact, that you tell them what they need well before they realize it themselves.”*

Steve Jobs, Former Apple Chief Executive Officer



# Government Customer Service – A Call to Action

This guide is designed to help agency officials, customer service teams, and front-line employees to gain better insight into your customers. This guide highlights “Key Points” and foundational principles and outlines actions to “Get Started.” There are references and resources at the end of the guide to check out for further information on points covered.

Whether you already know who your customers are, or need more in-depth understanding of customer needs, or maybe you’ve never evaluated (and agreed upon) your customers, now is the time to understand your customer.

## Key Points

- **It’s the right thing to do.** Customers have the right to demand the best from the federal government. As public servants, it’s our duty to provide fellow taxpayers with the best value and service for their tax dollar.
- **Government is not keeping up.** Government lags industry in overall customer experience (CX).
- **Technology and social media.** Both are game changers – in meeting customer needs across multiple platforms, and allowing customers immediate ways to provide feedback.
- **Customers are varied and many.** Understanding and defining your internal and external customers will help transform government by providing services that meet their needs and expectations.

## Get Started

- **Make a commitment to develop a customer experience strategy.** Partner with others in your office and agency to promote and implement customer experience strategy in your workplace. Your CX strategy should drive business decisions and resource allocation.
- **Understand your customers.** Before you develop products, services and CX strategies, start with understanding and defining your customers.
- **Document customer experiences.** Use personas to describe your customers. Incorporate journey maps to describe end to end customer journeys and ideal experiences.
- **Conduct research.** Seek to understand what your customers think and need. Listen.
- **Analyze your data.** Determine what you already know about your customers. Gather all sources of customer information. Include all customer touch points, including websites, contact center, social media and any other channels that customers reach you.
- **Share insights.** Communicate what you’re learning about your customers and what you’re doing to continually improve experiences. This will also help to develop your CX strategy.

## Point 1: Get Started

Jump-starting a coordinated customer experience effort may seem daunting. You may not have a budget or dedicated resources, but don't let that stop you. Try these practical tips to get started.



### Key Points

- **Re-use or consolidate resources.** Use satisfaction survey language or measurement tools that other teams or agencies have already tested, and piggy-back on existing efforts. Consolidate websites and other customer channels to streamline and save money.
- **Stand up a CX team or office.** Even if it's one or two people, get started. Create your business case to show the impact of *not* funding CX. If you've saved money by consolidating, use those savings to fund your new office. Look for volunteers to help you.
- **Learn from others.** Talk to other agencies who've shown success in the areas that you want to improve. Learn from their experiences.
- **Start small and focused.** Tackle one or two issues at a time to gain momentum and show success. Test early and often, to be sure you're moving in the right direction. This guide has ideas to help you get started.



### Get Started

- Build capacity around major functions. When the Department of Veterans Affairs (VA) launched their Veteran's Experience Office, they focused on specific areas, including customer insight and design, measurement and performance management, and operations and governance.
- Tap the Presidential Innovation Fellows (PIF) program for expertise or detailees: <https://www.whitehouse.gov/innovationfellows>. The Pathways Program (which includes Internship, Recent Graduates, and Presidential Management Fellows (PMF)) may also provide candidates for a rotational CX assignment with your agency: <https://www.opm.gov/policy-data-oversight/hiring-authorities/students-recent-graduates/>
- Share resources such as sample voice of customer surveys, best practices and lessons learned, analytics tools, and ideas to increase employee engagement.
- Identify existing expertise in your agency, such as Lean Six Sigma practitioners, or small programs or offices that are already providing a great customer experience. Recruit them to join your CX team or to work on projects.
- Collaborate early with your operations, technology, and policy teams. Success happens through collaboration, not siloes.

## Point 2: Define Your Customers

Defining and agreeing upon who your customers are is the important first step in building solid customer experiences.



### Key Points

- **Customer Types.** You may have several types of customers, including internal (employees), external (direct and indirect customers), and stakeholders (people with a vested interest in your services, even if they don't directly benefit).
- **Engage all levels.** Key representatives from all levels in your organization should help to define *and* agree upon who your customers are. Work your way through each program to ensure all areas of the organization are included.
- **Tap internal knowledge.** Employees are a gold mine and know first-hand about customers. Include human resource personnel, financial officers, contact center staff, employees who interact with customers in-person, help desk personnel, account and customer relationship managers.
- **Involve product development, IT staff and developers.** Products, web sites and digital services should be based on customer needs. Include technical staff early and consistently.



### Get Started

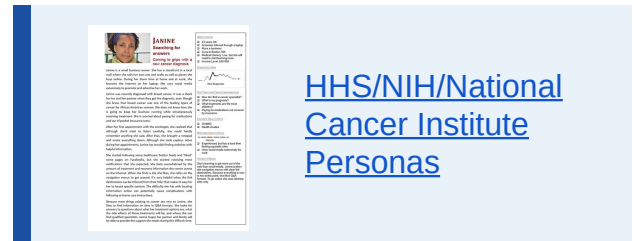
- Establish senior executive level support to focus on customer experience in your organization. There may likely already be people across your organization who already are focused on this, but the effort is not coordinated across programs, divisions or organization units. This is an opportunity to come together and start a formalized CX program.
- Pull together a team of "CX champions" from across your organization to jump-start your efforts.
- Interview every program area within the organization to identify customer segments.
- Create a master inventory of customer segments to help guide your CX strategy.
- Identify areas where additional agreement or understanding is needed about customers; pull together key stakeholders in this decision and come to resolution.

## Point 3: Document Your Customers and Their Experiences



### Key Points

- **Bring customers to life.** Develop personas (fictional characters) that illustrate your target customers' behaviors, attributes, motivations, goals and emotions.
- **Personas** should be based on qualitative and quantitative user research and web analytics. Here is an example from the National Cancer Institute.
- **Map customer journeys.** Customer journey mapping should be part of your larger CX strategy, with a clearly defined purpose and a view of the experience from the customer's perspective. Journey maps illustrate the path customers take as they engage with a service or a series of touch points with your organization, across programs, and agencies. Journey maps can help you understand the current state, visualize the future state, and determine the path to improvement.
- **Describe the desired customer experience.** Define your customers' top tasks, based on data analysis. Understand why some customers prefer different channels; optimize access to information and services via customer-preferred channels such as mobile devices.



### Get Started

- **Define your key customer segments using your customer data.** Review web analytics to understand how users come to your website, what devices they are using, what they search for, and understand how they access content, and what content they are most interested in. Base personas on your quantitative customer data and also qualitative data, which can often be gleaned from key stakeholders who understand customers from different perspectives (e.g., contact center and front line employees who interact directly with customers).
- **Make journey mapping part of your normal business.** Identify opportunities, challenges, customer perceptions and emotions within customer journeys. Assign owners of each customer journey. Determine priorities for improvement based on what you learn from your journey maps. Here are some examples based on common customer personas from GSA's USA.gov.





## Point 4: Conduct Research

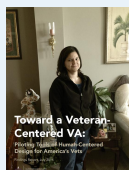
Leading companies know their customers intimately. As federal CX practitioners, we must apply the same level of research to gain deeper understanding of our customers. There are many techniques, tools and sources of data to help.

### Key Points

- **Conduct qualitative research.** In addition to personas and journey maps, qualitative research should be embedded into your processes. Qualitative research seeks to understand what customers think and why.
- **Understand Voice of Customer (VOC).** VOC programs provide useful customer feedback and actionable insights to help in planning and decision making around CX priorities and areas for improvement. VOC can identify “at risk” customers. Listen. Take action.
- **Conduct Ongoing Usability Studies/Testing.** Usability testing involves people testing the design, functionality and usability of products (e.g., websites, software, mobile apps) and processes. You should test websites, interactive voice response (IVR) systems in your contact centers, and any other customer channels.

### Get Started

- **Implement a VOC Program.** VOC can help you obtain valuable customer feedback about specific interactions and will tell you how customers feel about their experiences. Obtain VOC from all channels, including web, contact center (telephone, web chat and e-mail), and social channels. Don't forget your mobile users. Your VOC program can include various surveys, including telephone, website, post transaction, and employee surveys. Identify common measures for VOC across programs so you have a baseline of consistent data to monitor, analyze and report to show success.
- **Pay attention to unsolicited customer feedback.** Online discussion forums, social media posts and customer reviews provide valuable customer insights.
- **Conduct qualitative research.** Qualitative research will tell you “why” customers feel or act a certain way. Observe customer's behavior in their natural setting (ethnographic research). Focus groups, customer interviews, diary studies, in-home observations, and one-on-one interviews are all methods to gain valuable insights about perceptions, opinions, beliefs, and attitudes toward your product or service. Here is an example of a human-centered design pilot project from the VA. This qualitative research project explored 40 Veterans' experiences interacting with the VA.



#### [Toward a Veteran-Centered VA:](#)

Piloting Tools of Human-Centered Design for America's Vets

## Point 5: Analyze Data for Customer Insights

In order to understand your customers' current experience, their feelings and emotions, you must continually analyze your data for valuable insights. Evaluating their current experience paves the way to building better experiences with your products and/or services.



### Key Points

- **Determine *who* owns customer data.** Determine who is currently responsible for evaluating the customer experience. Understand who collects and analyzes customer data.
- **Identify *how* customer data is shared.** Understand what happens to all the customer data collected by your agency. Is it used to improve the customer experience? Is it shared at a high level, to gain a bird's-eye view of the overall experience? Is it siloed, with each program collecting data and acting independently?
- **Identify key players who need to be looped in.** Determine the key stakeholders who need to be involved in data analysis and sharing results. Bring programs together to break down silos and share information.



### Get Started

- **Establish a team dedicated to analyzing customer insights and metrics.** Monitor progress toward goals, adjust resources or tactics, if needed. Determine the biggest customer issue, and tackle that first.
- **Analyze website metrics.** Identify web metrics that will help you track the performance of your website and use the [Digital Analytics Program \(DAP\)](#) (a federal-wide analytics tool) to monitor those metrics. You'll be able to see trends and anomalies and observe how changes in web content, design or functionality may affect results.
- **Learn how others are interacting with government online.** [Analytics USA](#) helps government agencies understand how people find, access, and use government services online.
- **Review contact center data.** What questions are customers asking your contact center? What's driving them to call instead of using a self-service channel? Analyze in concert with web data to improve self-service options.
- **Make data driven decisions.** Establish priorities and outcomes you want to achieve based on data and facts.

## Point 6: Share and Take Action on Customer Insights

As you learn more about your customer, share customer understanding and data with your organization—at all levels—from employees to managers and senior executives. Share insights early and often. Prioritize your actions that will address problems *and* that will highlight successes and best practices to model.



### Key Points

- **Customer insights drive your customer experience strategy.** Socialize and communicate your understanding.
- **Share results and insights.** Create awareness throughout your organization or agency. This will help drive change and set CX priorities.
- **Experiment.** Try several ways to share customer insights. Personas, journey maps help facilitate discussions, but there are other ways to be creative. Many companies use videos, blogs and/or “listening posts” to listen to actual customer interactions and monitor customer insights from social channels. Watch usability testing on websites and other products and applications.
- **Take Action.** Use results to: evaluate your organizational values and customer priorities, influence employee behavior and culture, and improve business processes and products.



### Get Started

- Share results. Share journey maps and other customer research. Post journey maps in your office. Talk about them and show where you’ve identified areas to improve and what you’re doing to address challenges and opportunities for improvement.
- Use infographics and visualize your data so it’s meaningful to others. Consider problems as golden opportunities to improve.
- Establish a forum and process to review CX program status and metrics regularly.
- Conduct employee training to help everyone understand customers feedback and emotions and how your organization is prioritizing improvements.
- Assign specific CX tasks to employees and include in their annual performance plans.
- Conduct routine “customer sessions” (frequency can be based on your internal and external resources; e.g., quarterly or biannually). In person interactions with customers can be very helpful. Review their results and feedback, and plan areas for improvement together. Be transparent.

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## Appendix - Additional Resources

Below are some additional resources on the points covered in this guide. Check them out to learn more.

### Define Your Customers

Understanding Your Customers: Marketing Donut

<http://bit.ly/1TRaUTD>

<http://bit.ly/NU3EKc>

### Document Your Customers

Usability.gov - Personas: <http://1.usa.gov/1cZZfj6>

The Customer Service Playbook for Government, Your Winning Game Plan, GovLoop:

<http://bit.ly/1g6d03N>

### Conduct Research

Digitalgov.gov - User Testing and Research: <http://1.usa.gov/1SCESbz>

Usability.gov - Methods: <http://1.usa.gov/1HSr2N3>

Ideo, Design Kit: The Field Guide to Human-Centered Design: <http://bit.ly/1g0Oijk>

Delivering Cross Agency Customer Service (Pilot Project): Feedback USA: [feedback.usa.gov](http://feedback.usa.gov)

### Analyze Customer Data for Insights

Digitalgov.gov - Metrics: <http://1.usa.gov/1Kls0Vb>

International Customer Management Institute (ICMI) - Metrics: <http://ubm.io/1SCFzSe>

### Share and Take Action on Customer Insights

Forrester's Blog - What do I do with my data? <http://bit.ly/1liXMPa>